Co-Creative Dialogue for Meeting Practical Challenges

New Approaches

By Rosa Zubizarreta

Several decades ago, during an earlier lifetime in education-related work, I was hired as a writer at an education reform non-profit. This organization promoted constructivist approaches for improving students' academic learning and developing their socio-emotional intelligence. My own background as a teacher had been in language arts, so I was well-versed in using dialogic approaches for helping students engage with texts and explore questions of values and meaning. Yet I remember being genuinely puzzled at first by this organization's mathematics department: how might one engage in constructivist dialogue, in a field where it seems obvious that there is one right answer?

I offer this story in connection with the initial reluctance some of us may feel when considering dialogic approaches within certain hard realms, whether with children or adults. There has been much fertile growth in the realm of Dialogic OD in the last several decades (Bushe & Marshak, 2009). This includes a growing number of emergence-based dialogic methods, each with its own gifts, niches, and applications. Some of these emergence-based methods have applications in realms that may, at first blush, appear to be an unlikely fit.

In that long-ago initial encounter with constructivism in mathematics education, I was given an article to read that contained an enlightening description of a classroom dialogue, where various teams of students were offering their solutions to a given math problem, and describing aloud the various ways they had arrived at such. As the students gave voice to their divergent thought processes, they became aware of a diversity of valid approaches to arrive at a given solution. In addition, they also had the opportunity to discover their own misunderstandings and self-correct their own thinking as needed, all within a supportive climate of experimentation and respect—thus encouraging the emergence of a deeper understanding of the underlying concepts at work.

While this example opened my mind to the possibility of using dialogic approaches in other realms, it also made it clear that this kind of learning requires skillful facilitation, and is not reducible to letting students loose to learn on their own. The connections between this story and new dialogic approaches for facilitating groups addressing practical challenges will be developed further below. Next, I want to briefly consider the subject of co-creativity.

Creativity and Non-Linearity

In the realm of business, creativity has been recently heralded as "the most important leadership quality" for success, an "essential asset" that must "permeate the enterprise." Leaders are encouraged to "practice and encourage experimentation at all levels of the business" and to "equip their entire organization to be a catalyst for creativity" (IBM, 2010). What is key here is not just individual creativity, but even more so, the ability to be co-creative together with multiple stakeholders, including internal staff as well as external customers (Ramaswamy & Gouillart, 2010).

Yet there are many ways that our

organizations and methodologies conspire against creativity. For example, while we know about the non-linear nature of creative thought (DeBono, 1992), many collaborative design/collaborative problem-solving methodologies are still structured in a linear fashion. This includes interest-based stakeholder consensus methodologies as well as group problem-solving processes that begin with getting agreement on defining the problem, then on all of the solution requirements, then ask participants to prioritize all of those requirements; only in the last stage do we get to begin looking at actual solutions.

Of course, even when attempting to follow a linear model, most of us acknowledge that real-life processes are seldom quite so neat and tidy. Nonetheless, the conventional model is one of step-by-step progression (*Figure 1*). In contrast, a contemporary example from the field of software development can help us envision other alternatives (*Figure 2*). Agile methodologies have been developed as alternatives to the conventional waterfall approach, partly based on the key understanding that early solution attempts or prototypes can be crucial for deepening our understanding of the problem itself.

What might our collaborative approaches look like if we incorporated this agile insight regarding the value of initial solutions? One initial example along these lines is the concept of rapid-cycle prototyping (Senge et al., 2004; Scharmer, 2007), which is a component of the Change Lab process (Bojer, Roehl, Knuth, & Magner, 2005). Next, I will describe two other facilitation approaches that also incorporate this key insight, albeit in a different manner than the Change Labs.

Dialogue Mapping and Dynamic Facilitation

I first encountered the above charts in 2002, in a Dialogue Mapping workshop led by Jeff Conklin, who was illustrating cognitive science research findings on opportunity-driven problem-solving. In fact, he did not mention "agile" at all; his green line was labeled "Designer/subject process." His intention was to

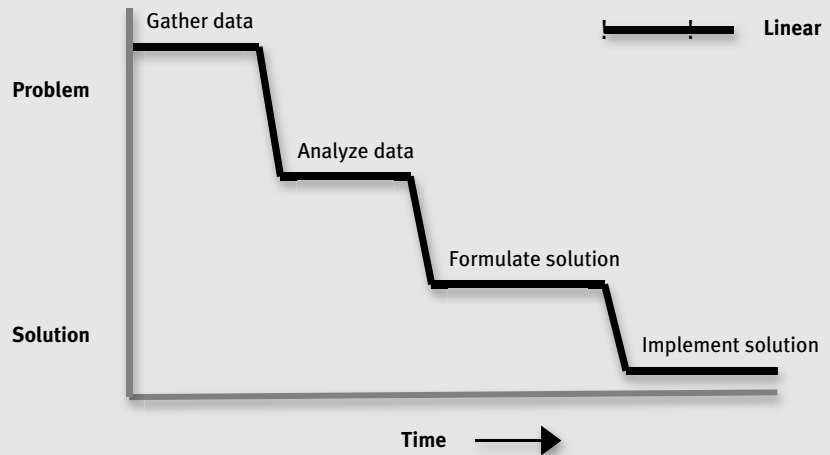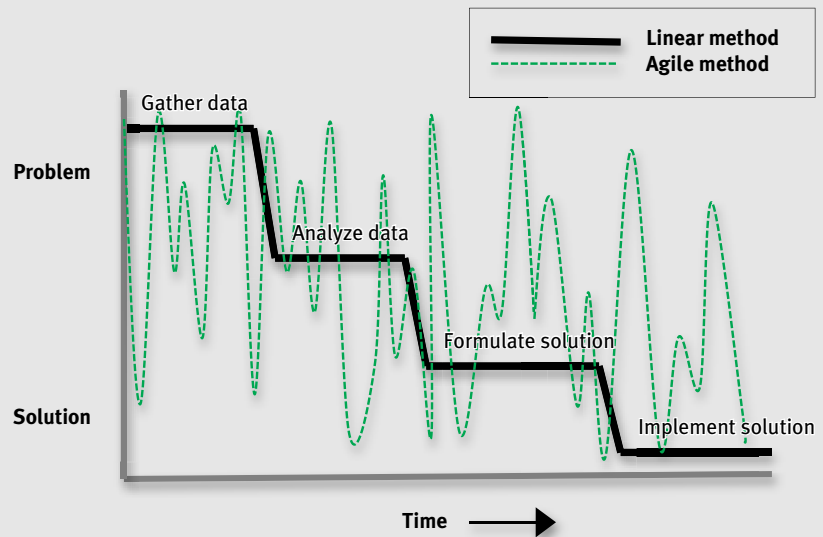Figure 1: Traditional Group Problem-Solving Process

Figure 2: Comparing Linear Method and Agile Method

help workshop participants understand why the approach of welcoming initial solutions was such an effective element of his non-linear, software-assisted facilitation approach, designed specifically for addressing wicked problems (Conklin, 2005).

Unlike the math class described earlier, wicked problems are not ones that have a single right answer. Yet these highly complex problems call for actionable, real-world solutions. Thus, they also fall into the realm of hard problems that are typically (albeit ineffectively) addressed with waterfall approaches (Conklin, 2005).

At the same time, there seems to be a growing appreciation of the need to address complex problems in creative and

iterative ways (for example, see Innes and Booher's 2010 description of collective bricolage, pp.136-138). Non-linear methods are beginning to gain greater traction. In their recent work, Culmsee and Awati (2011) illustrate Dialog Mapping in action by describing powerful case studies of multiple-stakeholder projects in Australia.

In this article, I will be sharing some brief case examples from Dynamic Facilitation, a low-tech dialogic approach designed to reliably evoke creative breakthroughs (Rough, 2002a, 1997). While also incorporating the key principle of welcoming initial solutions, it does not require any software. Some basic ways in which Dynamic Facilitation differs from

conventional approaches to facilitation include: a) welcoming initial solutions rather than postponing solutions; b) facilitator multipartiality rather than neutrality; c) protecting the emergence of a creative field through spatial redirection rather than temporal constraints; d) retroactively organizing information rather than using an agenda; and e) holding space for emergent convergences rather than facilitating toward convergence. Next, we will see what this approach looks like in practice.

Many of us experience being able to think more clearly, beyond our usual limitations, whenever we are fortunate enough to be listened to in a non-judgmental, supportive way. Meanwhile, current brain science supports the crucial role of a supportive listener, through its findings regarding how quickly our physiology can shut down from an expansive creative mode, to a protective and defensive one, especially in response to minute social cues...

First Case Example

The setting for this meeting was a small winery experiencing both record growth and ensuing growing pains. The sales and the warehouse department had been experiencing some friction among them. During this particular joint meeting, the intention was to explore a frustrating situation regarding truckers who often arrived late. These truckers delivered cases of wine to stores and restaurants, the winery's customers. Customers, in turn, often bought their wine via a broker, an outside middleperson who interfaced with the sales department.

After a brief introduction to the facilitation process, we began by inviting someone to jump in, and sketch out the situation as they saw it: "This is not a small company anymore... we deserve to be treated as a large corporate business... we are at a point now where we could choose to do things differently, but we are bent over a barrel, because we don't have any repercussions in place for truckers who are late."

This initial solution of establishing repercussions evoked different perspectives: "We should treat our customers, the way they treat us.... if it is a particularly valuable customer who has placed a last-minute order, it may make sense to go many extra miles... we should still bend over backward, as long as it doesn't get in our way."

Other participants proposed additional possibilities: "whatever policies we create, we need to make sure the brokers know about them... we could charge the truckers for being late... we could have customers pay a 'rush charge' for late orders... we could 'ding' the brokers, whenever the truckers are late."

Concurrently, participants were also surfacing concerns with regard to one another's solutions: "It could affect our image negatively if we start charging truckers who are late. It would change it to a more corporate image... not sure we can charge truckers for being late. It would need to be directed at the distributor... a 'late charge' to the truckers would take lots of manpower to create and enforce, and could cause a lot of frustration...if we were going to institute a 'late charge,' we would need to give the truckers advance notice."

Other relevant information—historical, procedural environmental—was also surfacing: "Sometimes we have in fact turned away truckers who were late. They in turn billed us, and when we didn't pay them, they short-paid us on other stuff, to get back at us... Currently we give truckers a few hours' window. If we were to create a harder policy, first we'd need to get upper management to commit to it, and then

we'd need to let the customers know... Other companies turn away truckers. They don't care—we are different because we *do* care about the customer getting their wine."

During this part of the conversation, the main facilitator interventions consisted of listening to and drawing out each participant ("Can you say more about that?"), inviting them to shift their complaints into creativity ("How would you address that issue, if it were up to you?"), checking for meaning, and recording each contribution on one of four charts: solutions, concerns, data, and problem-statements. At one point the facilitator asked a manager to wait until a participant had finished speaking, before voicing her concern regarding that idea. Whenever a concern arose regarding a proposed solution, the facilitator had the participant redirect that concern to the facilitator, instead of toward the idea originator.

After exploring a variety of possible solutions with no easy answers in sight, participants began shifting into a more reflective mood. At this point the facilitation role consisted of "just listening" while participants experienced the challenge of their current situation. Teresa, a warehouse employee was describing how frustrated she had been about the most recent incident of lateness, where she'd had to stay in the warehouse for six hours past the end of her shift. Suddenly Sally, a sales associate, jumped into the conversation: "What?!! You had to wait here, for *how* long?"

Other participants were shaking their head; this was not news to anyone. Yet it seemed as though Sally was just hearing this for the first time. "I told you," said Teresa, "I told you I had to miss my afternoon class, and call around like crazy for a babysitter."

Sally looked deeply chagrined. "I knew there was a problem, but I thought you warehouse people were sort of exaggerating."

Allan from the warehouse chimed in, pointing to the charts: "Well, there really *is* a problem, and that's what we've been working on here." As Sally's gazed floated over the charts, suddenly she brightened and said, "Well you know, the brokers are

the ones who hire the trucking companies. Next time anything like this happens, I need to know about it, so that I can give this feedback to the brokers. And if it's a pattern, I will definitely be encouraging the brokers to hire a different company."

Exploring the Story

There's always more to a story, and any story can be read in different ways. Below, I will explore some of the key principles of this approach, as illustrated by this example. Yet first, I want to clarify what I am not saying.

 I am not claiming that we would not have arrived at a similar result, had we used another method. Sometimes we obtain results in spite of our methods, while other times our methods more directly support our outcomes. So the point is not that what happened here would not have happened otherwise. Maybe it would have!

At the same time, I have found great value in using approaches that work with and encourage creativity, rather than constrain it with attempts to over-manage. Just as Open Space Technology foregrounds, optimizes, and supports what tends to happen in any conference during coffee breaks (or what tends to happen at the office, around the water cooler), some open meeting technologies serve to foreground, optimize, and support co-creative flow and meaning-making. These large-group and small-group emergence-based methods can be combined in synergistic ways; for example, Howard, Galarneau, Perez and Shaw (2005) explore how Open Space Technology can be combined with Dynamic Facilitation.

Returning to the winery, here are some key principles I would like to highlight:

Eliciting creativity by welcoming initial solutions. From a theoretical perspective, we can understand the need for people to "empty themselves" or "download" the solutions they already have, before something new can be created. Indeed, we often hear from practitioners that the energetics of using Dynamic Facilitation appears to embody the Theory U model (Scharmer,

2007); for an intriguing story that parallels the pause at the bottom of the "U," see Rough (1991).

However, the benefits of welcoming initial solutions are not just limited to downloading. They also include honoring participant's individual creative work to date; helping participants begin to listen better to one another, through the experience of being fully heard; and giving participants the opportunity to realize, as they compare notes, the various assumptions and incomplete perspectives that were embedded in their initial solution attempts (Zubizarreta, 2006).

At the same time, this key principle runs counter to most conventional facilitation wisdom (including interest-based negotiation), which typically asks participants to restrain themselves from jumping to solutions with the positive intention of helping them detach from their own initial strategies. From the viewpoint of Dynamic Facilitation and Dialogue Mapping, we support the intended outcome of broadening perspectives, yet offer a different and paradoxical approach for getting there.

Taking all sides. The stance of active multi-partiality is different from the conventional facilitator role of being neutral. Instead of a transactional view of communication, where each speaker is conveying a discrete, pre-formed cluster of meaning, we can invoke a more relational process, where meaning is actively co-constructed between people (Pearce & Pearce, 2000). This is not only applicable for interactions between participants, but also between a participant who is speaking and the facilitator who is listening; we find much common ground with Pearce's perspective that the role of the facilitator is to "shape emerging patterns of communication so that multiple voices and perspectives are honored, and the tensions among them are maintained" (Pearce & Pearce, 2000).

Yet viewing the role of the facilitator as an active, co-creative listener is not only a postmodern perspective; from a constructivist stance, Vygotsky's "zone of proximal development" in children (Vygotsky, 1978) may well be a phenomenon that continues on throughout adulthood. Many of us

experience being able to think more clearly, beyond our usual limitations, whenever we are fortunate enough to be listened to in a non-judgmental, supportive way. Meanwhile, current brain science supports the crucial role of a supportive listener, through its findings regarding how quickly our physiology can shut down from an expansive creative mode, to a protective and defensive one, especially in response to minute social cues (Rock, 2008).

From any of these perspectives, we have a significant opportunity as facilitators to support each participant by actively engaging with them in the meaning-making process, letting each person know what sense we are making of what we are hearing—not as a mirror coldly reflecting back, but as active participants in receiving the gift that each participant is seeking to offer. Jean Rough, one of the founders of Dynamic Facilitation, calls this *we-flection* (Zubizarreta, 2012).

Actively protecting the emergence of creative field. We saw one example of this when the manager at the winery was interrupting her staff member, and the facilitator intervened. Continually re-directing any concerns toward the facilitator is another aspect of this active protection, and is key for creating a field where creative thinking and critical thinking can co-exist.

We are all familiar with brainstorming, where creative idea generation and critical idea evaluation are separated *in time.* Another example is the brilliant Six Thinking Hats model (DeBono, 1992, pp. 77–85) where there are different times for "green hat thinking" and "yellow hat thinking," as distinct from "black hat thinking." In contrast, in Dialogue Mapping and Dynamic Facilitation the facilitator protects participants' creativity *in space.* In Dynamic Facilitation, we ask the participant to direct their concern to the facilitator, who writes it on the concerns chart. In Dialogue Mapping, the concern is placed on the growing logic tree of the electronic shared display, visibly supplementing (rather than supplanting) the idea that provoked the concern. In both approaches, the spatial redirection serves to minimize

interpersonal anxiety, while maximizing creative tension.

Second Case Example

This second case example portrays a longer process, a two-day strategic planning retreat. The client was an accounting software reseller, servicing small-to-mid-sized firms. The cast included the founder and CEO, as well as nearly all of the remaining employees of this small company where a recent economic downturn had resulted in a string of layoffs.

as well as individual creative initiatives ("If it were up to you, what do you think needs to be done about it?") while at the same time, reaffirming the agreed-upon frame of input-gathering. Unlike a typical action research process, however, I did not do anything with this information, instead I asked each person if they would be comfortable offering their input to the whole group during the upcoming two days.

During the first day with the whole staff, I proceeded as described above in the first case example; drawing out participants' initial solutions, redirecting

know originally I said I just wanted input. But I think the way the conversation is going, I'll be able to make a quick sketch of a plan over lunch, and then bring it back to the group this afternoon to get their take on it. It just seems really obvious, what the next steps are that we need to be taking."

Exploring the Second Case Example

Again, there are many ways we might read this story. For now, I'd like to highlight two main themes:

Retroactively organizing information. Rather than using an agenda to keep participants on topic, we can consider the agenda to be the creative process of the group, as it emerges through the creative process of each individual within the group and their interaction with the whole. All of the information that is gathered can be then organized retroactively.

Clarity around decision-making. I often invite clients to engage in creative dialogue as a "tilling the soil" in preparation for their customary decision-making process. At the same time, it's quite common for much of the need for subsequent decision-making to evaporate, as the way forward becomes clear and obvious to all involved. When outcomes are arrived at as a result of an emergent process, there seems to be much higher levels of alignment, motivation, and follow-through; hence the value of evoking outcomes through co-creativity and emergence rather than negotiation.

> Given an adequate orientation to the sometimes disorienting nature of a non-linear method, participants seem to generally appreciate and find value in this approach. Yet as with any method, a great deal depends on the initial contracting work with the client. Also, as we saw in the second example, dialogic processes can be effective for inviting greater participation, and even co-creation, when authority structures are clear. However, like many other processes, they work less well when leadership is unclear or disputed—likely due to the greater difficulty of engaging a group in a creative flow when there is a high degree of basic anxiety in the background.

When the CEO of the firm initiated a request for a strategic planning retreat, he acknowledged that during the last year, he had not called any whole-staff meetings since "I only had bad news to share." However, now they had "hit bottom," were fully lean, and "had nowhere to go but up." So he felt it was time to rebuild morale by involving the staff in a collaborative planning process. At the same time, the CEO was very clear about retaining his final decision-making authority, and saw the purpose of the two-day meeting as solely that of input-gathering.

Not having worked with this company previously, our conversational arc included initial individual interviews with each staff member. This was an opportunity to establish rapport by exploring organizational strengths ("What's working well?"), organizational challenges ("What do you see as the main areas that need attention?")

any concerns, checking for understanding, and recording their various perspectives, creative solutions, and concerns on chart paper. During the course of the first day, we thoroughly covered the walls.

That evening, after typing up a raw version of the notes, I also did a light sort. Our day-long, free-ranging conversation clustered easily into a set of themes. Placing the corresponding solution ideas, concerns, and perspectives under these thematic headers, resulted in a document that clearly highlighted how much the group had accomplished.

Day two started with handing out both sets of notes, the raw as well as the light sort, and inviting participants to correct, modify, or add anything that was needed. From there, participants jumped into the conversation again, now at a deeper level. During our mid-morning break, the CEO called me aside. "This is great!" he said. "I

Challenges and Limitations

In this section I will focus on some of the challenges encountered by new practitioners, as well as by those of us seeking to share this work with our colleagues.

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One challenge often encountered from fellow practitioners is the perspective that "this isn't dialogue, since you can't have dialogue when you're talking about solutions!" As I described in the beginning of this paper, dialogue can serve worthwhile ends even in the context of a mathematics classroom, where there may be multiple ways to obtain a given solution. Co-creative dialogue is even more useful in situations where the solutions need to be created freshly, through the participation and collaboration of everyone involved.

Practitioners are sometimes also uncomfortable with the initial phase of the process, where participants are intentionally asked to talk to the facilitator instead of directly to one another, especially when voicing concerns. This runs directly counter to what has conventionally been taught as good practice.

Having a more active facilitator role during the initial phase allows participants to "come as they are," without any initial training in dialogic conversation. Rather than laying out norms, we are creating a developmental container where attitudes are caught, not taught. Yet this also points to a limitation of these kinds of practices. To allow untrained groups to engage in a free-ranging creative exploration, while at the same time arriving at shared understanding and powerful results, requires a certain level of skill on the part of the facilitator.

The practice of actively taking all sides, recording participants' contributions, and holding space open for creative possibility, might best be described as "simple, but not easy." For those used to more directive approaches, some unlearning may need to take place. One of the greatest challenges can be to refrain from efforts to manage convergence, which is key for allowing a different kind of convergence to emerge. Instead of focusing on the majority perspectives, dot-voting, and so on, we are

continually listening for the voices at the edge, complexity theory's weak signals that can help us shift together into new ways of understanding the situation at hand (Schoemaker & Day, 2009).

Wrapping Up and Going Further

In this paper, I have pointed to the value of co-creative dialogue in situations where, due to the nature of the subject matter, we often default to more linear, control-oriented approaches. Two case examples have illustrated the value of welcoming initial solutions, while also showing how an emergence-based process can interface productively with established authority structures. We have seen how an active facilitation role creates an environment where both creative thinking and critical thinking can co-exist simultaneously, and how organizing information retroactively can allow us to engage in a more open-ended process moving forward.

What has not been explored here, and thus remains implicit, is the developmental potential of having people work on practical and challenging issues in a co-creative and dialogical manner. While we have anecdotal evidence of this (Atlee, 2012, pp.108-109; Rough, 2002b), more research is needed on how using this approach with task-oriented groups creates conditions where participants can shift from what Shepard called "primary mentality," or "me vs. we," to the perspective of "secondary mentality," or "me AND we" (Shepard, 1965). Harrison (1995, 1987) has another, more direct yet controversial way to talk about this kind of shift; "releasing the power of love in organizations."

This brings us full circle to the math department mentioned at the beginning of this paper. In line with the mission of the larger organization, this department's focus was not limited to helping teachers teach mathematics in a constructivist way; it also sought to tap the potential for fostering socio-emotional development that is inherent in a collaborative, discovery-oriented math classroom.

As a species, we are only just beginning to tap into the power of dialogue (Eisen, 1995; Kahane, 2012; Seikkula &

Trimble, 2005). In parting, I want to leave my readers with these questions: What if our pressing practical challenges, including ones where we find ourselves polarized due to a divergence of multiple and often clashing perspectives, could became opportunities for greater creativity and interpersonal growth? And, what if we already have much of what we need, to help this come about?

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